

Session 4: Module 2 - Demographics	
FINAL	
Description	Text
<b>Introduction</b>	<b>Welcome</b> to M-SPIRIT <b>Session 4, Module 2</b> , of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
<b>Start</b>	Demographics – Part 1.
<b>Demo</b>	Demographics displays information that is both individual to a member of the household (at a member level) and the same for all members of the household (at a household level).
	The CGS activity has the same fields as the Demographics tab in the participant folder. However, some of the fields in the CGS may have extra functionality associated with them such as assignment of risk factors or affecting eligibility.
<b>&lt;demo1&gt;</b>	Click the Demographics link.
<b>&lt;demo2&gt;</b>	<no script>
<b>&lt;demo3&gt;</b>	If you remember the Applicant Prescreening window, all of those fields are from the Demographics screens and most function in the same way.
	Demographics has three sub-tabs on the right margin: Demographics, AdditionalInfo1 and AdditionalInfo2.
	This first demographics module will talk about the display with the tab labeled "Demographics".
<b>Demo1</b>	The WIC Category defaults based on the selection in the Applicant Prescreening window, the current selection in the Participant Folder or the selection made in the WIC Category prompt when the CGS is first opened for women.
<b>Demo2</b>	The Category can be changed in the Participant Folder if the participant is not yet certified in order to allow you to correct the Category if you selected the incorrect one during Prescreen.
	A breastfeeding woman's WIC Category can also be changed to non-breastfeeding as long as her baby is less than 6 months old.
	The system will recalculate the certification end date when this category change is made.

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<demo4>	M-SPIRIT will let you know if the WIC Category cannot be changed in the Participant Folder.
	Bea's baby was born about 8 months ago. She is no longer breastfeeding.
	Let's see what happens if we try to change the WIC Category in the Participant Folder instead of the CGS.
	Click the WIC Category drop-down arrow.
<demo5>	Select Non-breastfeeding.
<demo6>	<no script>
<demo7>	A message displays that reads: The participant's WIC Category cannot be changed in this manner. A new certification will need to be completed.
	Click the OK button.
<demo8>	<no script>
<demo9>	So, back in Delhi's Demographics screen in her CGS...
	The Email field is a household level field, which means once entered it auto-populates into other household member's folders.
	The Email address is used by the system to send automated appointment reminders if your agency uses M-SPIRIT's Appointment Scheduling functionality.
	If an applicant does not want to share her email address or she does not want to receive appointment notices via email, leave this field blank.
	We are going to quickly type an email address for the household.
<demo10>	The PMI # field is available if your agency chooses to enter a Medicaid, Driver's License or other number here.
	It is saved individually for each member of the household and can contain a maximum of 16 letters and/or numbers.
	Go ahead and type: 12345678 into the PMI field and then click on the Race/Ethnicity button.
<demo11>	The Race/Ethnicity is required if it hasn't been selected at a previous certification. Otherwise, the previous selection will auto-default.
	Both Ethnicity and Race must be selected.
	You can select more than one Race.
	Click on the American Indian or Alaskan Native checkbox.

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<demo12>	Notice that by selecting the American Indian or Alaskan Native race option, the Tribe drop-down list was enabled.
	Once enabled, a selection must be made from the Tribe drop-down.
	Click the Tribe drop-down arrow.
<demo13>	If your participant is Native American, you must identify a tribal affiliation.
	If the participant does not know or does not wish to provide the information, and she is not claiming adjunctive eligibility based on tribal affiliation, you can select Other.
<demo14>	Let's take a quick look at the list.
	Click on the drop-down arrow again to close the list without making a selection.
<demo15>	Let's click on the American Indian or Alaskan Native checkbox again to de-select it.
<demo16>	Let's select Asian.
<demo17>	...and Black or African American since that is what Delhi indicated to us when we asked her to select her Race.
<demo18>	Only one Ethnicity can be selected.
	Delhi indicated she is not Hispanic or Latino. Select her ethnicity.
<demo19>	Click the OK button.
Demo3	The Homeless checkbox allows you to indicate if the participant lacks a fixed and regular night time residence.
	The system will auto-assign Risk Factor 801 - Homelessness when it is checked.
	M-SPIRIT still requires you to enter both a residential and mailing address.
	If there is no known street address, put a description of, or directions to, where the participant is staying (for example, tent in a campground) in the Physical Address Field.
	If the participant does not have an actual mailing address, copy the physical address into the mailing address.
	If you have any questions about how to document addresses for a homeless participant, please contact the WIC Helpdesk.

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<demo21>	Notice the fields in the Homeless section are currently disabled.
	Now, click the Homeless checkbox.
<demo22>	Both the Date Verified and the Fixed Nighttime Location fields become enabled once Homeless is selected...
	...and the Residency Proof field becomes disabled.
	Although Residency Proof is no longer required by the system, you must still complete both the Residential and Mailing Address sections.
	Today's date is 9/25/2010. Notice that the current date defaults into the Date Verified field.
Demo4	If changes are made to Demographics in the Participant Folder and the Homeless checkbox is selected, before saving your changes the system will perform a validation to ensure that the Date Verified is less than 30 days ago.
	A system-generated reminder message will appear indicating that the "Homeless Verified Date must not be 30 days prior to the current date" if the date needs to be updated.
<demo23>	The Date Verified field is saved for the entire household as is the Homeless checkbox.
	However, the Fixed Nighttime Location selection is saved at a member level since it is possible that members of the same household are staying at different nighttime locations.
	Go ahead and click on the Fixed Nighttime Location drop-down arrow.
<demo24>	If the participant is homeless, you must select one of the options from this list.
	Please note: The system will allow you to type into this field. DO NOT TYPE INTO THIS FIELD!! This is a statewide list.
	Since Delhi is not homeless, click on the drop-down arrow to close the list without making a selection.
<demo25>	Let's also de-select the Homeless checkbox.
<demo26>	You are required to ascertain proof of identity at each certification and record it in the ID Proof field.
	Click the ID Proof drop-down arrow.

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<demo27>	There are a lot of different options.
	Select the appropriate proof of identity from the drop-down list that reflects the information provided by the participant.
	Delhi provided her Driver's License. Select it from the list.
<demo30>	You must verify Proof of Identity at every certification; however, if the proof was previously scanned into the participant's record, you do not need to rescan it.
<demo31>	The participant must also provide Residency Proof at each certification.
	You must scan the residency proof only if the participant is new to WIC or has moved.
Demo5	Proof of Residency is stored at a household level.
	M-SPIRIT will auto-populate the field based on a previous selection if another household member has been certified within the past 60 days.
<demo32>	Click the Residency Proof drop-down arrow.
<demo33>	There are not too many choices here...
	Delhi's brought a Utility Bill for Proof of Residency. Select it from the list.
<demo34>	No script.
Demo6	When the Proof of ID or Residency is not available at the time of certification, you must select the <b>**PENDING PROOF**</b> option from the respective drop-down list.
	By selecting this option you are granting the participant temporary eligibility and M-SPIRIT will only allow you to issue one month of benefits at a time.
Demo7	Although there is a system-generated CPA Review Alert indicating when either Proof of ID or Residency is Required, it is an individual alert and will only appear if you happen to open the correct household member's participant folder.
	To ensure that the next person who assists this participant knows to verify the required documentation, we suggest that you create a household alert.

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Reminder	Keep in mind, you can only create an alert from the participant folder and you will have to either close the CGS to create the alert or remember to do so once you've completed the cert.
Demo8	If at the next benefit issuance, the participant provides the required ID or Residency information, you should select the appropriate option from the drop-down list in the participant folder.
<proof>	For example, at Bea's appointment last month, she forgot to bring any proof of ID and ***PENDING PROOF*** was selected.
	She received one month of benefits when she was certified and this time has brought her Driver's License as ID proof.
	In the Participant Folder, you need to update the ***PENDING PROOF*** selection with the documentation provided.
	Click on the ID Proof drop-down arrow.
<proof1>	Select Driver's License from the list.
<proof2>	<no script>
<proof3>	Click on any folder tab to exit Demographics.
<proof4>	When exiting Demographics, we need to make sure to select Yes on the Do You Want to Save? message.
	Once the ID Proof is saved, M-SPIRIT will allow benefits to be printed.
Demo9	If at the next benefit issuance, the participant still does not have the required documentation, you are responsible for following policy and ensuring that no more benefits are issued until the participant brings their proof of ID or residency.
	Refer to the State Plan, Chapter 5, Policy 5-21, if you require further clarification.
Demo10	On rare occasions, a participant may be unable to provide any documentation due to fire, theft, disaster, migrancy, homelessness, etc.
	These cases are rare.
	The State Plan, Chapter 5, Policy 5-21 contains provisions for this situation.
<noproof>	If a participant meets a requisite for not being able to provide proof, you can select the **PENDING PROOF ** option from the ID Proof...
<noproof1>	...or **PENDING PROOF ** on the Residency Proof drop-down list.
Demo11	So, if no proof of identity or residency can be produced...
	The applicant must sign the Montana WIC Program Proof of Residency/Identity form.

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	This form is available on the Montana WIC Website.
	This form can be used for one month only.
	After the form has been completed, scan the signed form into the participant's folder.
<noproof2>	This is a sample of the Montana WIC Program Proof of Residency/Identity form.
	Participants who cannot provide proof of ID or Residency must sign this form.
	Indicate which proof the participant couldn't provide by circling either Residency or Identity, or both...
	...and document the reason why by jotting a note on the form or putting a Note in the Participant's folder.
	You and the participant must then sign the form.
	Scan the completed form into the participant's folder, with a comment like Proof Waiver. You may shred the original once it has been successfully scanned into the folder.
Demo12	So, to recap... To complete documentation when residency and/or identity cannot be produced, complete the Montana WIC Program Proof of Residency/Identity Form.
	To complete the form, you must indicate the type of proof that is missing and note why the proof is missing. This can be a handwritten note on the Proof of Residency/Identity form or a note in the participant's folder.
	Finally, scan the form into the participant's folder. If it is proof of residency that is missing, then scan the form into all household members' folders.
<demo35>	The Physically Present field is only enabled in the CGS.
	It allows you to indicate whether the participant is present at their certification appointment.
	On rare occasions, the participant may not be present at their certification appointment.
	If you click the No radio button, the Reason Not Present drop-down list becomes enabled.
	Go ahead and click on No.
<demo36>	Click the Reason Not Present drop-down arrow.

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<demo37>	If the participant isn't present, you must select the applicable option from the list of allowed reasons why a participant may not have to be present at their certification.
	The documentation that explains why the participant wasn't at their certification appointment must be scanned into the participant's folder.
	Click on the drop-down arrow again to close the list without selecting an option since Delhi is present for her appointment.
<demo38>	Click the Yes radio button.
<demo40>	The Maiden Name fields are only enabled for women.
	You can collect this information, but it is not required.
<demo41>	You can select the Migrant checkbox to indicate if a participant is a migrant farm worker.
Demo13	This field is saved at the household level, which again, means selecting it for one family member will cause it to be auto-selected in other family members being certified.
	M-SPIRIT auto-assigns Risk Factor 802-Migrancy when the Migrant checkbox is selected.
<demo42>	You can select the Living with Foster Parent(s) checkbox if the participant is currently living in foster care.
Demo14	The Living with Foster Parent(s) checkbox is enabled for all WIC categories so that it is available for younger pregnant or postpartum participants who may also be in foster care.
	However, Risk Factor 903 - Foster Care is <b>not</b> auto-assigned by the system because only you, the CPA, can determine whether to assign the risk.
	The CPA should only assign it if the participant entered the foster care system or moved from one foster home to another within the past 6 months.
<demo43>	The Clinic Assigned drop-down list is populated with your Agency's list of clinics.
	Click the Clinic Assigned drop-down arrow.
<demo44>	If the participant will be attending another clinic to pick up their benefits or for future appointments, you can select that clinic from this list.



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	Select LAUREL WIC.
<demo45>	<no script>
<demo46>	Choosing another clinic will initiate the transfer process.
	The transfer message opens that reads: "Do you want to transfer this participant to this clinic?"
	If you wanted to assign the participant to that clinic, you would click Yes and the Clinic Assigned would change to the clinic you selected.
	However, for now click No since we want to keep Delhi at the same clinic she is currently assigned to.
<demo47>	We have not yet discussed the Income Calculator.
	How to determine income eligibility will be reviewed in upcoming modules in this Session.
	We will review the Address History and Copy Demographics buttons in the next module.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.